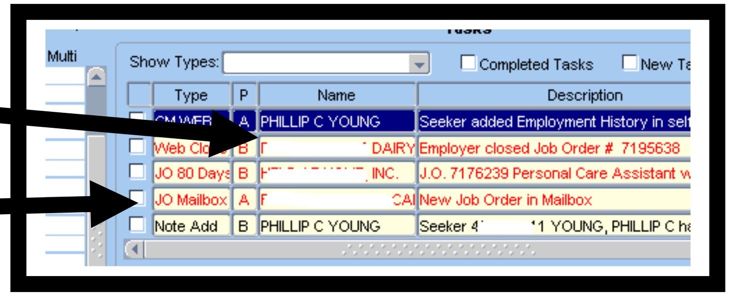
Working with Tasks in Toolbox 2.0

QuickStart

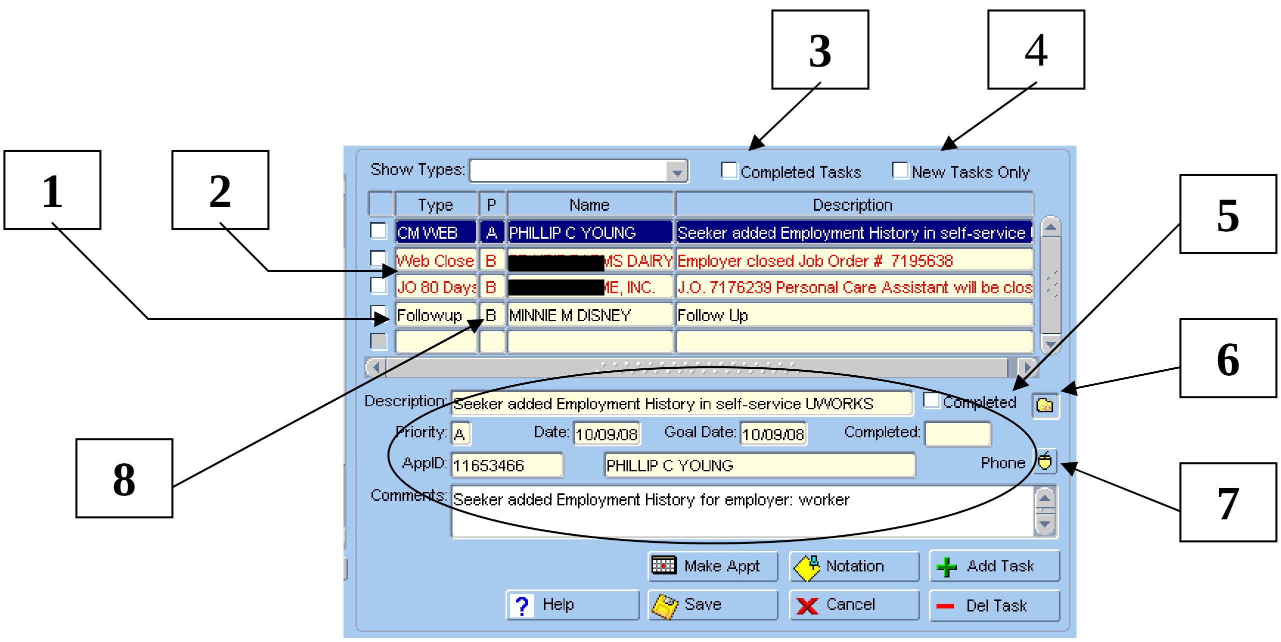
1. ***Examine (Read) Task***

2. ***Remove (complete) task by clicking check box.***



Working with tasks on the Toolbox 2.0 Scheduler

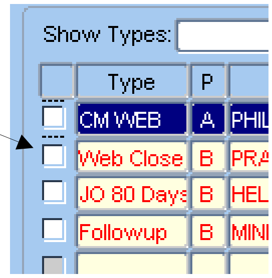
The Toolbox 2.0 system provides a scheduler with a sophisticated tasking system, notifying the user of events important in the management of customers. ***Most of these tasks can be removed from view after reading, by clicking the checkbox next to them***, but a few may require that an operation be performed before they can be removed. If that is necessary, a popup will remind you of the needed operation. (these are program specific and are, or will be, addressed in the program desk aid) Tasks should be viewed at least daily and can be accessed by 1) clicking the scheduler icon: , 2) Viewing the "Daily Schedule" tab (default).



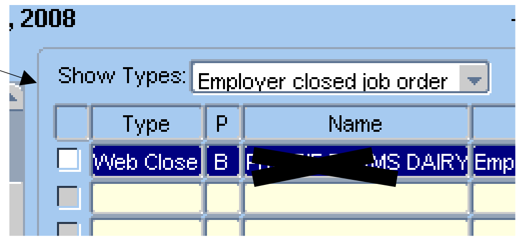
Task section of Scheduler
Figure 1

1. New tasks appear in black type and are by default at the bottom of the display.
2. Tasks set for dates in the past (past due) are printed in red.
3. Clicking the "Completed Tasks" box will allow viewing tasks that have been viewed and marked as "Completed."
4. Clicking the "New Tasks Only" box will allow viewing only new tasks.
5. A complete description of the task can be viewed by selecting the desired task from the list at the top.
6. Clicking the folder icon will immediately navigate to the Toolbox 2.0 module needed to view more information or to complete a needed operation. In this case, it will open the seeker record, "Seeker Info" tab.
7. Clicking Mouse Icon will display phone number of seeker.
8. Priority indicates importance of task .

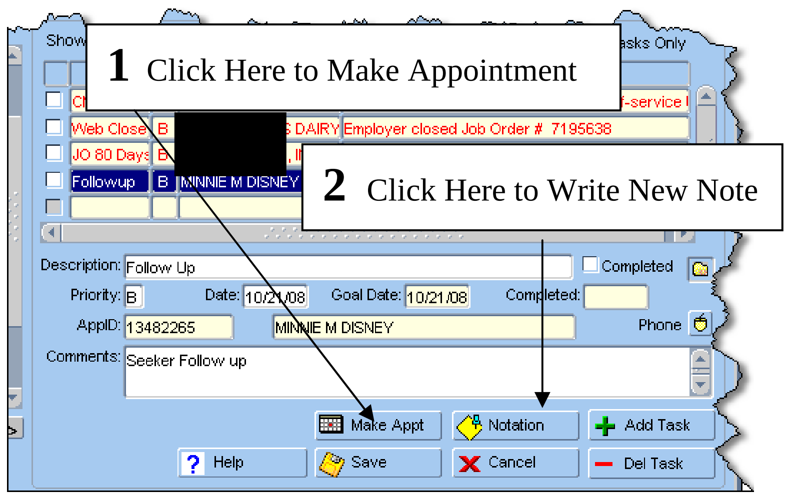
To remove or "Complete" a task, click the check box to the left of the task listing line. It will immediately disappear. A task can be retrieved by clicking the "Completed Tasks" box, and unchecking the box.



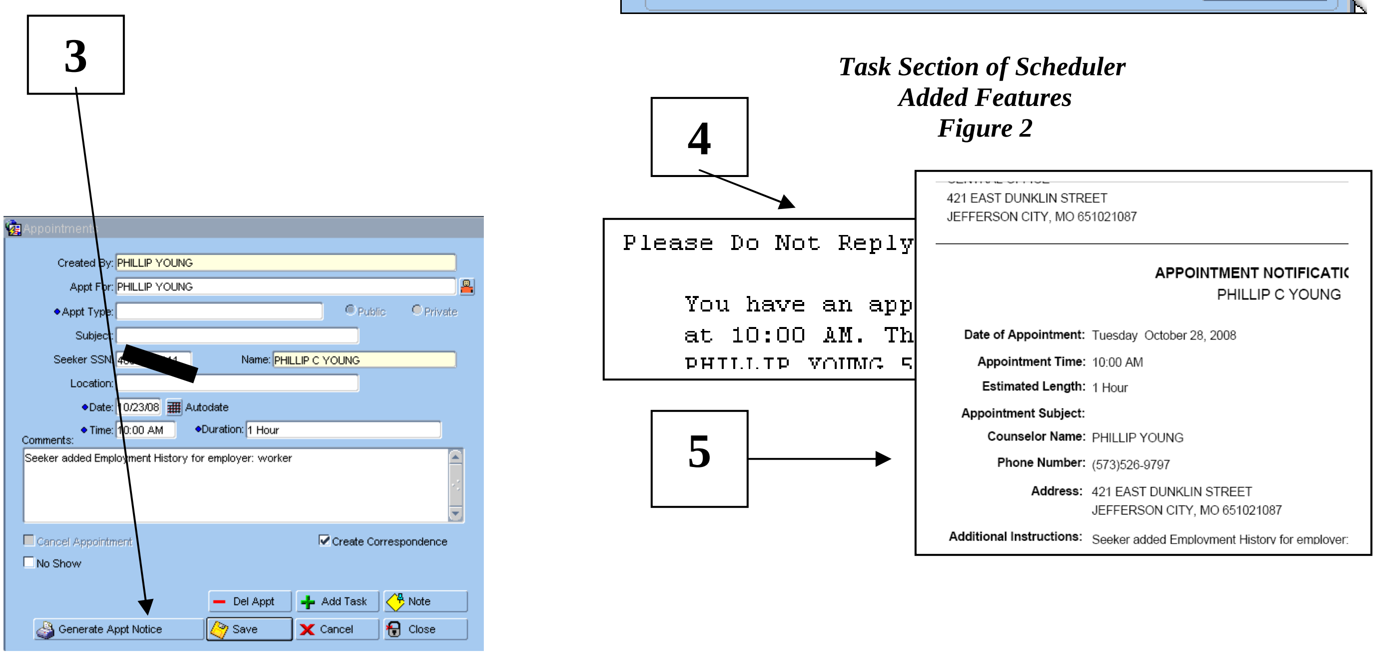
The "Show Types" drop down may be used to search for and view only certain tasks. This might be used in conjunction with the "Show Closed" checkbox to view all of a certain type of tasks.



1. An appointment can be created for the seeker.
2. A note can be generated from this module, pre-populated with the customer's information – employer or seeker.
3. If the "Generate Appt Notice" is clicked, you have the option of sending:
4. An email notification to the seeker about the appointment.
5. If you select "No," a mailable notification will be generated.



Task Section of Scheduler
Added Features
Figure 2



Notification Options
Figure 3

Tasks related to a seeker are also recorded in the "Seeker History" module. Columns are provided for the task date, Counselor receiving task, Description, and Results. Note that manually set tasks will have a future date, but they will appear on the customer's history. (see below 12/14/09)

Date	Type of Service	Counselor	Description	Results
12/14/09	Task	PHILLIP YOUNG	Touch Base with Seeker	Not Complet
10/20/08	Service	PHILLIP YOUNG	Job Referral	
10/09/08	Task	PHILLIP YOUNG	Seeker added Employment History in self-service UWORKS	Not Complet

Seeker History Module
"Seeker Services" tab
Figure 4

The tasks generated by the system are in most cases self explanatory. Since there are over 150 separate tasks, an explanation of each is beyond the scope of this document. The tasks fall into the following general categories, and some of the more common ones are detailed below.

General Tasks sent to Counselor of Case Managed Customer

1. Notice of modifications of the seeker's record by another counselor.
2. Notice of modifications of the seeker's record by the customer from the web.

Case Management Tasks

There are several program specific tasks (WIA, PFS, CAP, TAA/ATAA, Veterans) designed to assist the program counselors manage their customers. Guidance for these tasks may be obtained by referring to the desk aid for that program.

Job Order Tasks

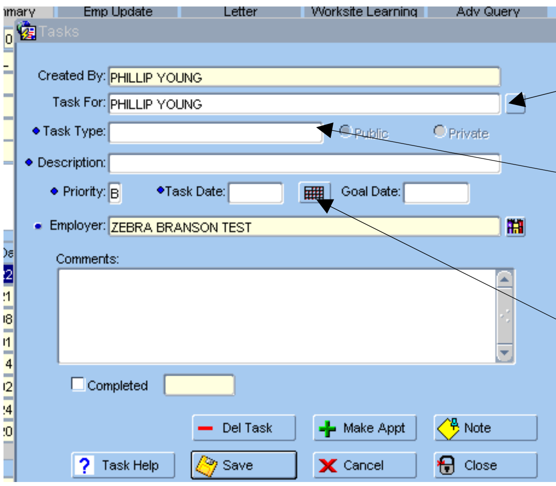
When a job order is DWD managed, the counselor of record will be notified via a task:

1. When the job order is within ten days of closing.
2. When the job order was closed by the employer.
3. When the job order was modified or closed by another counselor.
4. When the job order closes.
5. When the job order reaches the maximum referral count and goes on "Hold."
6. To the counselor of the seeker when a case managed customer is resulted as "Hired."

As a FYI: Many of these notifications operate via email to the employer, if the order is "Employer Managed."

Manually Setting Tasks

As the above details tasks are delivered automatically through the system, manually entered tasks are available as well. Setting tasks as a reminder to complete important operations can improve customer service and simplify your work routine. Clicking the Task Icon will access the task setting popup:  This popup screen will automatically populate with information from the last either seeker or employer accessed. In the example below, the task is populated with the Zebra Branson Test business site, since that was the last module visited in my Toolbox 2.0 session.



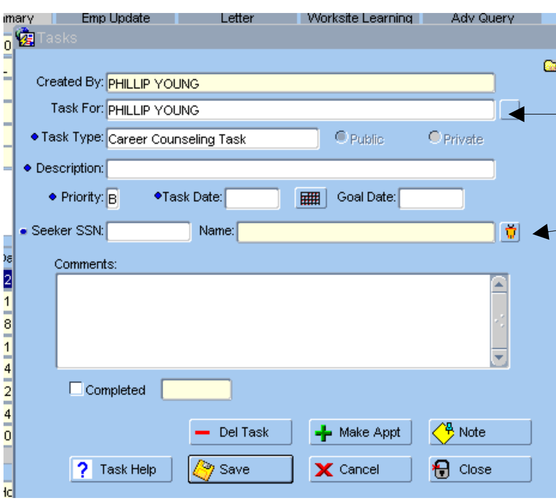
Double clicking in the “Task For” box will allow you to set a task for another counselor in your team. (location) It is easiest to type in the first three letters of the last name of the desired recipient.

Double clicking in the “Task Type” will bring up a list of values to set for the type. Note: If you select a seeker task, the screen will remove the populated employer information and change to a seeker input task screen.

Clicking the “Autodate” button will allow you to copy this task to multiple dates.

Manual Task Popup
Employer Screen
Figure 5

If I select (by double clicking for the List of Values) a seeker type task, it will then switch to a screen requesting seeker specific information. Had I been in a seeker record immediately before clicking the icon (or during) the seeker information would have automatically populated.



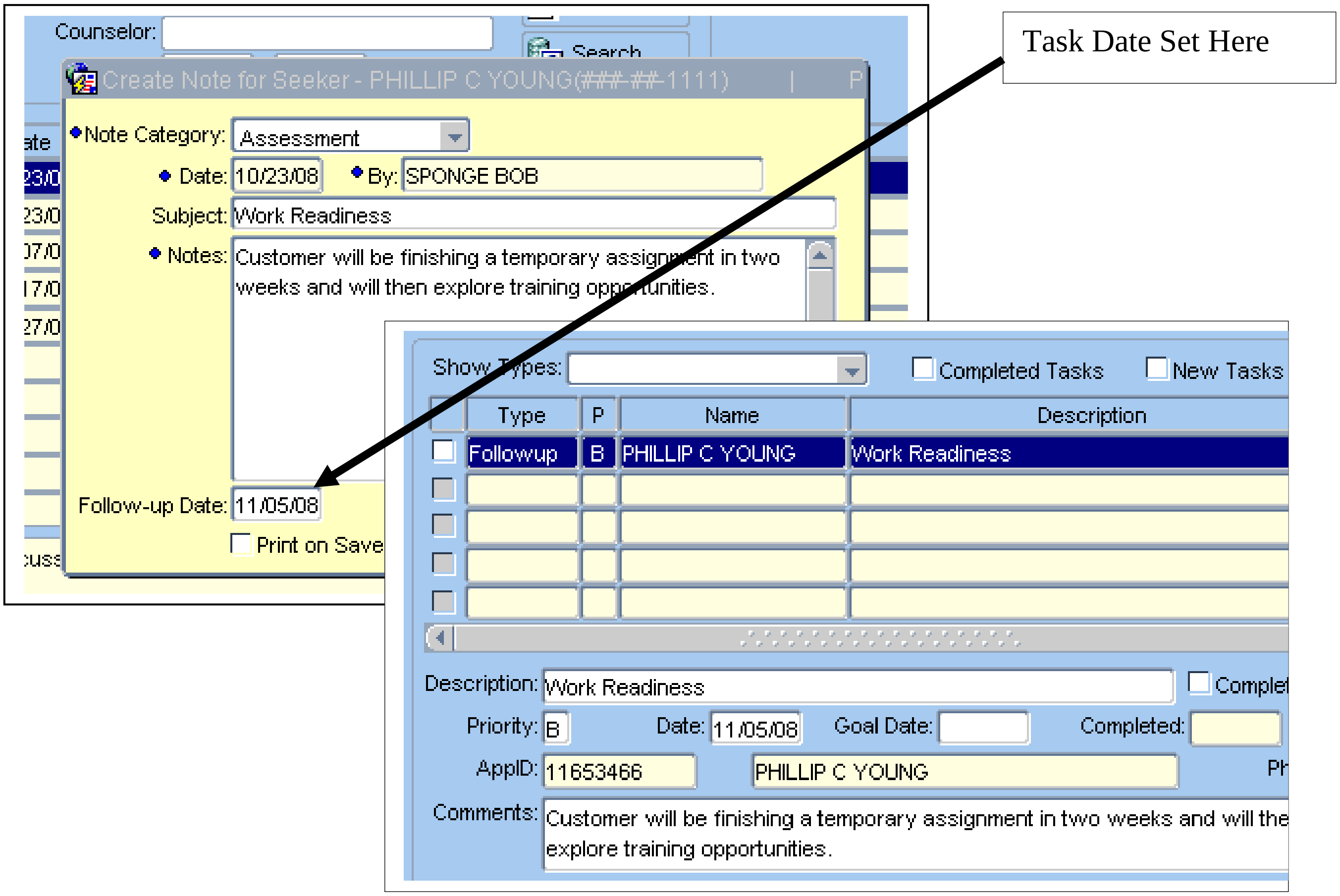
Brings up a Search of Counselors from all your teams.

Brings up a seeker search popup.

Manual Task Popup
Seeker Screen
Figure 6

Setting Tasks from Notes

As you notate information on a seeker or employer record, you may determine that it is desirable to follow-up at some time. The "Follow-up Date" will set a task for you on the date that you select, which will populate with the noted information.



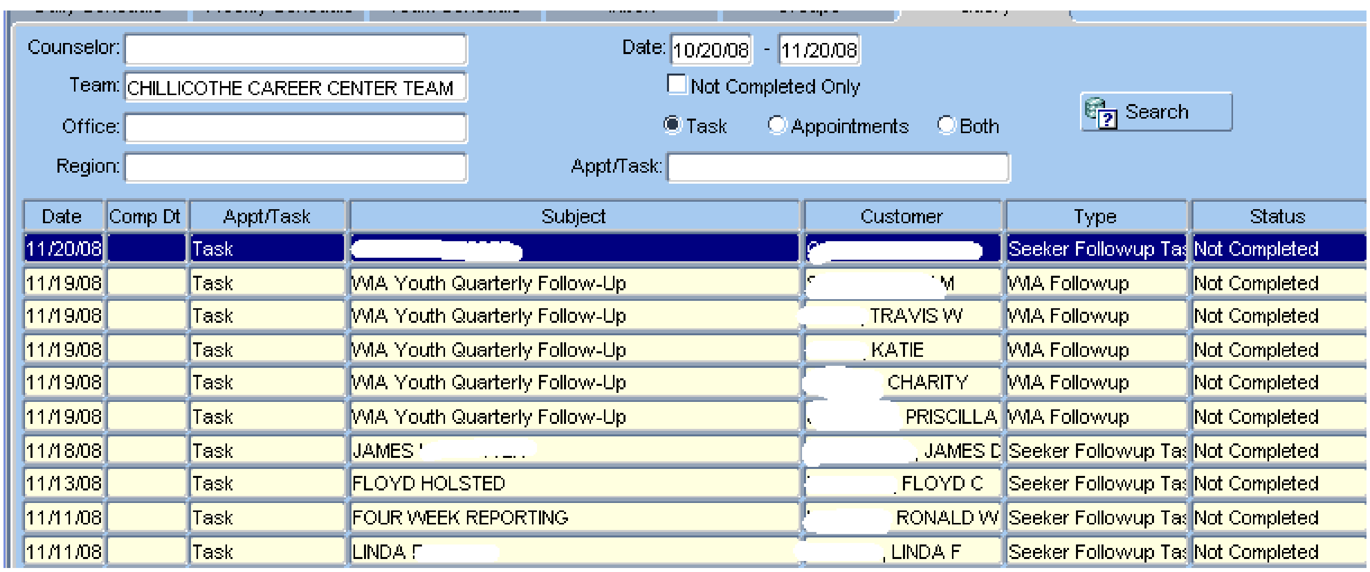
Create Note Popup (Above)
View of Task on November 5 (Below)
Figure 7

Viewing Future/Past Tasks

At times it may be desirable to view past or future tasks for yourself or tasks set for other counselors etc. The Query tab makes it possible to view completed/not completed tasks for any date range. ***System generated future tasks are not viewable using this query, since they are not yet generated by Toolbox 2.0, but manually generated tasks for future dates are available.***

It is important to set the date range before setting the other search parameters, since it will begin searching as soon as these (counselor/team etc.) are set. ***It is only necessary to set one of the parameters i.e. counselor/team etc.***

1. Navigate to the “Scheduler” module.
2. Click on the “Query” tab.
3. Set the date range desired to search. (Note: if you are searching an office/team or larger area, there will be potentially hundreds of tasks.)
4. Double click on any of the search types (Counselor/Team/Office/Region) to determine the tasks to be retrieved. You will only be able to select counselors in your team or teams in which you have membership. You can search any region or office in the state.
5. Click “Search.”



Date	Comp Dt	Appt/Task	Subject	Customer	Type	Status
11/20/08		Task	[redacted]	[redacted]	Seeker Followup Ta:	Not Completed
11/19/08		Task	WIA Youth Quarterly Follow-Up	[redacted] M	WIA Followup	Not Completed
11/19/08		Task	WIA Youth Quarterly Follow-Up	[redacted] TRAVIS W	WIA Followup	Not Completed
11/19/08		Task	WIA Youth Quarterly Follow-Up	[redacted] KATIE	WIA Followup	Not Completed
11/19/08		Task	WIA Youth Quarterly Follow-Up	[redacted] CHARITY	WIA Followup	Not Completed
11/19/08		Task	WIA Youth Quarterly Follow-Up	[redacted] PRISCILLA	WIA Followup	Not Completed
11/18/08		Task	JAMES [redacted]	[redacted] JAMES D	Seeker Followup Ta:	Not Completed
11/13/08		Task	FLOYD HOLSTED	[redacted] FLOYD C	Seeker Followup Ta:	Not Completed
11/11/08		Task	FOUR WEEK REPORTING	[redacted] RONALD W	Seeker Followup Ta:	Not Completed
11/11/08		Task	LINDA [redacted]	[redacted] LINDA F	Seeker Followup Ta:	Not Completed

Team Task Search
Figure 8